



# COMMONWEALTH of VIRGINIA

*Department for the Aging*

Jay W. DeBoer, J.D., Commissioner

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# *COMMONWEALTH of VIRGINIA*

*Department for the Aging*

Jay W. DeBoer, J.D., Commissioner

## **MEMORANDUM**

**TO:** Executive Directors  
Area Agencies on Aging

**FROM:** Janet L. Honeycutt  
Director of Grant Operations

**DATE:** February 18, 2004

**SUBJECT:** Assisted Transportation Task Force

We would like to create a task force to determine whether or not we need to create a new Service Standard for Assisted Transportation. This has been discussed numerous times over the years and the time has come for serious consideration. Please pass this information on to your transportation folks and decide who within your agency would be a part of this group.

Rather than trying to hook up 25 people on a conference call, I would like to suggest that perhaps we have 2 meetings for initial discussion. One in the Roanoke Area and one in the Charlottesville area. I can then send out meeting notes from both groups to all participants and see what the next steps would be based on the outcome of the meetings.

If you have any questions, please contact me.

# COMMONWEALTH of VIRGINIA

## Department for the Aging

Jay W. DeBoer, J.D., Commissioner

### MEMORANDUM

**TO:** Executive Directors  
Area Agencies on Aging

**FROM:** Faye D. Cates, MSSW, Human Services Program Coordinator

**DATE:** February 18, 2004

**SUBJECT: JEFFERSON AREA BOARD FOR AGING (JABA) RECEIVES FEDERAL HOME LOAN TO BUILD AFFORDABLE HOUSING IN RURAL AREAS**

U.S. Senator George Allen recently announced that the Federal Home Loan Bank of Atlanta (FHLBA) will award \$908,451 to eight housing projects in Virginia which will be used to construct 122 units of affordable housing. JABA will receive \$427,000 to provide 61 units of affordable housing for seniors in rural communalities. Congratulations JABA for continuing to be a player in the senior housing industry in your community.

For a complete listing of FHLBA Virginia awardees, visit Senator Allen's web site at [www.allen.senate.gov](http://www.allen.senate.gov), and read the February 10, 2004, press release, *Allen Announces Nearly \$1 Million of Affordable Housing Program Grants for Eight Virginia Localities*.

# COMMONWEALTH of VIRGINIA

## *Department for the Aging*

Jay W. DeBoer, J.D., Commissioner

### MEMORANDUM

**TO:** Executive Directors  
Area Agencies on Aging

**FROM:** Tim M. Catherman  
Deputy Commissioner, Support Services

**DATE:** February 18, 2004

**SUBJECT:** Staff E-Mail Addresses

E-mail addresses for VDA staff have changed! The old e-mail addresses have been discontinued. Please inform your staff to update their address books. All new e-mail addresses are generally in the format of "[firstname.lastname@vda.virginia.gov](mailto:firstname.lastname@vda.virginia.gov)". Attached is a list of staff e-mail addresses.

**Other important addresses:**

General E-mail [aging@vda.virginia.gov](mailto:aging@vda.virginia.gov)  
Monthly Reports [reports@vda.virginia.gov](mailto:reports@vda.virginia.gov)  
VICAP Reports [vicapreports@vda.virginia.gov](mailto:vicapreports@vda.virginia.gov)

If you have any questions, please let me know.

### **VDA Staff E-mail Addresses**

Add @vda.virginia.gov to the e-mail address below

<b><u>Staff</u></b>	<b><u>New E-Mail Address</u></b>
Allen-Sims, Jean	jean.allensims
Brannon, Robin	robin.brannon
Byrnes, Kevin	kevin.byrnes
Cates, Faye	faye.cates
Catherman, Tim	tim.catherman
Clarke, Rochelle	rochelle.clarke
Cummins, Pat	pat.cummins
DeBoer, Jay	jay.deboer
Driskill, Carol	carol.driskill
Eshmont, Leonard	leonard.eshmont
Garrett, Ben	ben.garrett
Honeycutt, Janet	janet.honeycutt
Hunley, Becky	becky.hunley
Ivory, Carol	carol.ivory
Maske, Trudy	trudy.maske
McKeon, Warren	warren.mckeon
Mucha, Marsha	marsha.mucha
Nau, Ellen	ellen.nau
Peterson, Bill	bill.peterson
Peterson, Charlotte	charlotte.peterson
Raney, Terry	terry.raney
Rasmussen, Ann	ann.rasmussen
Riddick, Janet	ejanet.riddick
Slasor, Cecily	cecily.slasor
Snead, Jane	jane.snead
Taggart, Jackie	jackie.taggart
Williams, Raymond	raymond.williams.

*COMMONWEALTH of VIRGINIA*

*Department for the Aging*

Jay W. DeBoer, J.D., Commissioner

**MEMORANDUM**

**TO:** Executive Directors  
Area Agencies on Aging

**FROM:** Janet L. Honeycutt  
Director of Grant Operations

**DATE:** February 18, 2004

**SUBJECT:** January Unmet Needs Report

Attached, please find the Unmet Needs Report for the month of January. If you have any questions, please contact me.

VIRGINIA DEPARTMENT FOR THE AGING  
Unmet Demand for January, 2004

PSA	R C V D	Adult Day Care			Home Delivered Meals			Homemaker			Personal Care			Residential Repair			Transportation			PSA
		Unmet		Persons	Unmet	Persons	Persons	Unmet	Persons	Persons	Unmet	Persons	Persons	Unmet	Persons	Persons	Unmet	Persons	Persons	
		Demand	Persons	Under-	Demand	Unserved	Under-	Demand	Unserved	Under-	Demand	Unserved	Under-	Demand	Unserved	Under-	Demand	Unserved	Under-	
		(hours)	Unserved	served	(meals)		served	(hours)		served	(hours)		served	(homes)		served	(trips)		served	
1	x	895	4	3	17,589	217	396	14,937	341	140	2,937	32	29	139	139	32	5,461	234	297	1
2	x	690	3	4	15,185	78	358	7,677	205	7	481	0	88	209	209	0	2	1	0	2
3	x	0	0	0	43655	259	807	8682	132	172	1979	19	16	84	16	68	28	10	4	3
4	x	0	0	0	10079	0	237	9395	144	156	0	0	0	0	0	0	1760	9	58	4
5	x	0	0	0	120	0	31	202	15	3	280	13	3	0	0	0	0	0	0	5
6	x	0	0	0	13491	141	541	19	2	0	141	15	3	6	6	0	7	7	0	6
7	x	0	0	0	338	8	9	0	0	0	5	1	0	0	0	0	12	6	0	7
8A	x	0	0	0	9	9	0	0	0	0	0	0	0	0	0	0	0	0	0	8A
8B	x	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	16	8	0	8B
8C	x	4840	39	0	28	3	0	28	3	0	0	0	0	0	0	0	8	4	4	8C
8D	x	0	0	0	1079	0	79	0	0	0	0	0	0	0	0	0	0	0	0	8D
8E	x	952	5	20	0	0	0	24	2	0	520	11	7	31	31	0	147	0	34	8E
9	x	400	5	0	625	0	73	7	0	2	675	0	34	7	7	0	1623	0	137	9
10	x	8988	1	8	3241	27	14	513	21	0	691	11	0	5	5	0	1728	0	72	10
11	x	0	0	0	645	65	13	28	12	1	4	1	0	0	0	0	49	0	49	11
12	x	0	0	0	23922	11	581	510	15	99	2098	16	80	13	13	0	70	5	18	12
13	x	1,828	5	18	575	9	23	3,155	90	94	236	2	7	0	0	0	0	0	0	13
14	x	0	0	0	16,608	0	329	2,576	0	88	0	0	0	0	0	0	0	0	0	14
15	x	80	1	0	0	0	0	255	9	0	527	9	0	11	10	1	80	3	0	15
16	x	0	0	0	0	0	0	160	10	0	0	0	0	11	8	0	0	0	0	16
17/18	x	1,928	8	5	2,185	2	49	1,072	22	23	3,608	58	5	17	12	5	2,295	90	206	17/18
19	x	105	0	4	200	0	5	2,250	0	39	0	0	0	0	0	0	20	0	10	19
20	x	0	0	0	44	2	0	400	25	16	800	25	32	0	0	0	322	161	2	20
21	x	296	0	8	0	0	0	0	0	0	7,931	42	138	0	0	0	3,017	129	11	21
22	x	0	0	0	88	44	0	0	0	0	35	4	1	28	28	3	0	0	0	22
TOTAL		21,002	71	70	149,706	875	3,545	51,890	1,048	840	22,948	259	443	561	484	109	16,645	667	902	TOTAL
ANNUAL		252,024	852	840	1,796,472	10,500	42,540	622,680	12,576	10,080	275,376	3,108	5,316	6,732	5,808	1,308	199,740	8,004	10,824	ANNUAL
# AAAs		25			25			25			25			25			25			# AAAs

This information is provided by Area Agencies on Aging.  
The Department is not responsible for the accuracy of the data provided by the Area Agencies on Aging.

# *COMMONWEALTH of VIRGINIA*

*Department for the Aging*

Jay W. DeBoer, J.D., Commissioner

## **MEMORANDUM**

**TO:** Executive Directors  
Area Agencies on Aging

**FROM:** Janet L. Honeycutt  
Director of Grant Operations

**DATE:** February 18, 2004

**SUBJECT:** Updated Training Calendar

Attached, please find a revised copy of the VDA 2004 Training Calendar.

Please note that the Area Plan Training that had been scheduled for April is no longer listed. Since there are few changes to the plan from last year, we have decided to cancel the full training and take questions on a case-by-case basis.

Financial Training is still scheduled and we will be happy to meet with any AAA that has questions about the Area Plan process.

If you have any questions, please contact me.



**VIRGINIA DEPARTMENT FOR THE AGING  
2004 TRAINING SCHEDULE  
JULY 1, 2003 THROUGH JUNE 30, 2004**

TOPIC	LOCATION	AUDIENCE	CONTACT PERSON	DATE
MIS Paradox System Upgrade Training Title V	Baltimore, MD	NCOA-funded Title V Projects	Pat Cummins	September 8, 2003 <i>Complete</i>
AIM Coordinators	Radisson Hotel, Hampton	AIM Coordinators	Leonard Eshmont	September 10, 2003 <i>Complete</i>
VICAP	TBA 1 PM – 5 PM	NoVA VICAP Coordinators and Volunteers	VDA Janet Riddick	September 10, 2003 <i>Complete</i>
VICAP	TBA 9 AM– 1 PM	NoVA VICAP Coordinators and Volunteers	VDA Janet Riddick	September 11, 2003 <i>Complete</i>
Ombudsman Manager Training	J. Sargent Reynolds 9 - 4	Ombudsman	V4A/VDA Joani Latimer/ Leonard Eshmont	September 16 & 17, 2003 <i>Complete</i>
AAA Nutrition Directors Fall Meeting & Training	Dept. of Forestry Charlottesville	AAA Nutrition Directors	Carol Driskill	September 19, 2003 <i>RESCHEDULED</i>
VICAP	TBA 1 PM – 5 PM	Tidewater Area VICAP Coordinators and Volunteers	VDA Janet Riddick	September 22, 2003 <i>CANCELLED</i>
VICAP	TBA 9 AM– 1 PM	Tidewater Area VICAP Coordinators and Volunteers	VDA Janet Riddick	September 23, 2003 <i>CANCELLED</i>
VICAP	TBA 1 PM – 5 PM	Southwest Area VICAP Coordinators and Volunteers	VDA - Janet Riddick	October 7, 2003 <i>Complete</i>
VICAP	TBA 9 AM– 1 PM	Southwest Area VICAP Coordinators and Volunteers	VDA -Janet Riddick	October 8, 2003 <i>Complete</i>

**VIRGINIA DEPARTMENT FOR THE AGING  
2004 TRAINING SCHEDULE  
JULY 1, 2003 THROUGH JUNE 30, 2004**

<b>National Family Caregiver Support Program (NFCSP)</b>	<b>DRS Richmond 9:30 AM</b>	<b>AAA NFCSP Staff</b>	<b>Ellen Nau</b>	<b>October 21, 2003 <i>Complete</i></b>
<b>Performance Standards &amp; Regulations Training</b>	<b>Roanoke</b>	<b>All Title V Projects</b>	<b>Pat Cummins</b>	<b>October 23 &amp; 24, 2003 <i>Complete</i></b>
<b>Ombudsman Manager Training Recap</b>	<b>Richmond</b>	<b>Ombudsman</b>	<b>V4A/VDA Joani Latimer' Leonard Eshmont</b>	<b>November 5, 2003 <i>Complete</i></b>
<b>AIM Infomaker / Report Writer Training</b>	<b>Richmond</b>	<b>AIM Administrators</b>	<b>Leonard Eshmont</b>	<b>December 9 &amp; 10, 2003 <i>Complete</i></b>
<b>Home Safe Home, Virginia ! and Remembering When</b>	<b>Richmond VDA</b>	<b>Grant Recipients</b>	<b>Carol Driskill</b>	<b>February 27, 2004</b>
<b>Title V Annual Spring Workshop</b>	<b>TBA</b>	<b>Title V Coordinators</b>	<b>Pat Cummins</b>	<b>March 30 – April 2, 2004</b>
<b>SQL Training</b>	<b>Richmond</b>	<b>AIM Administrators</b>	<b>Leonard Eshmont</b>	<b>March 9, 2004</b>
<b>How to Tame Your Stress and Develop an “I Can Attitude” (\$25)</b>	<b>Piedmont Geriatric Hospital Burkeville</b>	<b>Congregate Site &amp; Senior Center Managers and Staff</b>	<b>Carol Driskill</b>	<b>April 8, 2004</b>
<b>I&amp;R/Case Management Training</b>	<b>Richmond J. Sargeant Reynolds</b>	<b>Information and Referral Care Coordination Staff</b>	<b>Faye Cates and Ellen Nau</b>	<b>April 28, 2004</b>
<b>AAA Nutrition Directors Meeting &amp; Training</b>	<b>Dept. of Forestry Charlottesville</b>	<b>AAA Nutrition Directors</b>	<b>Carol Driskill</b>	<b>May 7, 2004</b>

**VIRGINIA DEPARTMENT FOR THE AGING  
2004 TRAINING SCHEDULE  
JULY 1, 2003 THROUGH JUNE 30, 2004**

<b>Fan Care/Cooling Assistance</b>	<b>Marion</b>	<b>All Fan Care &amp; Cooling Assistance Coordinators</b>	<b>Janet Honeycutt</b>	<b>May 3, 2004</b>
<b>Fan Care/Cooling Assistance</b>	<b>Charlottesville</b>	<b>All Fan Care &amp; Cooling Assistance Coordinators</b>	<b>Janet Honeycutt</b>	<b>May 10, 2004</b>
<b>Fan Care/Cooling Assistance</b>	<b>Fredericksburg</b>	<b>All Fan Care &amp; Cooling Assistance Coordinators</b>	<b>Janet Honeycutt</b>	<b>May 11, 2004</b>
<b>Fan Care/Cooling Assistance</b>	<b>South Hill</b>	<b>All Fan Care &amp; Cooling Assistance Coordinators</b>	<b>Janet Honeycutt</b>	<b>May 17, 2004</b>
<b>Fan Care/Cooling Assistance</b>	<b>Eastern Shore</b>	<b>All Fan Care &amp; Cooling Assistance Coordinators</b>	<b>Janet Honeycutt</b>	<b>May 24, 2004</b>
<b>How to Tame Your Stress and Develop an "I Can Attitude" (\$25)</b>	<b>Piedmont Geriatric Hospital Burkeville</b>	<b>Congregate Site &amp; Senior Center Managers and Staff</b>	<b>Carol Driskill</b>	<b>May 20, 2004</b>
<b>DOL Database/Reporting Training</b>	<b>TBA</b>	<b>Title V Coordinators</b>	<b>Pat Cummins</b>	<b>Spring 2004</b>
<b>VICAP/Medigap Web-Software Training</b>	<b>TBA</b>	<b>VICAP Coordinators and Volunteers</b>	<b>Eshmont/Riddick</b>	<b>Spring 2004</b>
<b>Financial Management Training</b>	<b>Richmond</b>	<b>AAA Financial Staff</b>	<b>VDA Staff</b>	<b>June 22, 2004</b>
<b>Financial Management Training</b>	<b>Roanoke</b>	<b>AAA Financial Staff</b>	<b>VDA Staff</b>	<b>June 24, 2004</b>
<b>Performance Standards and Implementation of Regulations</b>	<b>TBA</b>	<b>Title V Coordinators</b>	<b>Pat Cummins</b>	<b>Summer 2004</b>
<b>Safe Food Handling Certification (SevSafe) (Fee)</b>	<b>TBA</b>	<b>AAA Nutrition Staff</b>	<b>Carol Driskill</b>	<b>TBA</b>

**VIRGINIA DEPARTMENT FOR THE AGING  
2004 TRAINING SCHEDULE  
JULY 1, 2003 THROUGH JUNE 30, 2004**

<b>Volunteer Liability Issues</b>	<b>TBA</b>	<b>AAA Volunteer Program Directors</b>	<b>Bill Peterson</b>	<b>TBA</b>
<b>Title V Annual Fall Training</b>	<b>TBA</b>	<b>Title V Coordinators</b>	<b>Pat Cummins</b>	<b>TBA</b>

# *COMMONWEALTH of VIRGINIA*

*Department for the Aging*

Jay W. DeBoer, J.D., Commissioner

## **MEMORANDUM**

**TO:** Executive Directors  
Area Agencies on Aging

**FROM:** Ellen Nau, Human Services Program Coordinator

**DATE:** February 18, 2004

**SUBJECT: National Family Caregiver Support Program**

### **Tax Relief Legislation for Family Caregivers**

Legislation has been introduced in the U.S. Senate by Senator Larry Craig, Chairman of the Special Committee on Aging, to support families who provide caregiving help for their aging parents. The Senior Eldercare Relief and Empowerment Act (SECURE Act, S.2072) is designed to provide a 50 percent tax credit rate for qualified expenses for elder care provided to a senior citizen with long-term care needs. The press release from the U.S. Senate Special Committee on Aging is attached in PDF format. The U.S. Special Committee on Aging website is <http://aging.senate.gov>.

### **The Quiet Problem at Work: Business & Community Elder Care Resources for Working Family Caregivers & Their Employees** ([www.ncoa.org](http://www.ncoa.org))

This valuable resource developed by the National Council on Aging (NCOA) with Funding from the AT&T Family Care Development Fund, is now available at VDA. Deputy Director Bill Peterson attended a conference on working caregivers last fall and, as a result of his conference participation, we now have this notebook of suggested caregiver resources. Unfortunately, it is too large for me to copy and mail. Therefore, I will list the documentation in the notebook with its source. I have attached a pdf. of the Introduction and an article by Leah Dobkin, "Beginning the Dialog: How Employers and Employees Can Create Care-Giver Friendly Work Environment." Hopefully, this

SUBJECT: National Family Caregiver Support Program

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resource will aid you in raising the awareness of employers in your area about the issues and solutions of their employee caregivers.

**List of Materials in Notebook:**

1. **Introduction** – pdf. file attached.

**2. Resources for Employers**

**a. Articles:**

**When Employees Become Caregivers** – Centers for Medicare & Medicaid Services  
[www.cms.hhs.gov](http://www.cms.hhs.gov)

**Workplace Programs for Family Caregivers: Good Business and Good Practice**

[www.caregiving.org](http://www.caregiving.org)

**The MetLife Study of Employer Costs for Working Caregivers**

MetLife Mature Market Institute, 57 Greens Farm Road, Westport CT, 06880 or

National Alliance for Caregiving, <http://www.caregiving.org/>

**When a Colleague Dies** and **Diversity, in end of life programs in the workplace**

Last Acts, [www.lastacts.org](http://www.lastacts.org).

**Best Practices: Company Elder Care Programs**, work/lifeToday,

[www.worklifetoday.com](http://www.worklifetoday.com)

**b. Research:**

**The Metlife Juggling Act Study, Balancing Caregiving with Work and the Costs**

**Involved, The Metlife Study of Employed Caregivers: Does Long Term**

**Insurance Make a Difference? and, The MetLife Study of Sons at Work,**

**Balancing Employment and Eldercare**

[MatureMarketInstitute@metlife.com](mailto:MatureMarketInstitute@metlife.com)

**Research Findings from Studies with Companies and Caregivers** and

**Synthesis of Findings from Studies with Companies and Caregivers** Workplace

Task Force of the Last Acts Campaign [www.lastacts.org](http://www.lastacts.org)

**c. Tools:**

**Quiz – Ten Warning Signs of Caregiver Stress**

**Employer Caregiver Quiz**

**Business Strategies to Make Work Environments More “Caregiver Friendly”**

**Do’s: Don’t’s Information shared at Forum**

**Corporate Worker Questionnaire** – Center for the Study of Aging, University of Bridgeport

**Caregiver Self Assessment Questionnaire** – American Medical Association

**Calculating Your Eldercare Costs**

**Model Activities for Employers** – Last Acts

SUBJECT: National Family Caregiver Support Program  
Page 3 of 3

**A Consumer/Family Resources Compendium** – Last Acts  
**The Quiet Problem at Work** – NCOA – printed copy of slide show

**d. Trainings, Workshops**

**Elder Care Education Series** - Winter Park Health Foundation - <http://www.wphf.org>

**TLC in the Workplace** – Hospice at Greensboro - [www.hospicegso.org](http://www.hospicegso.org)

**Bringing Elder Care Home** – [www.bringingeldercarehome.com](http://www.bringingeldercarehome.com)

**Last Acts Tool Kit** – (Caregivers and End of Life Care) \$75 for tool kit or \$10 for cd  
Last Acts Tool Kit Request at Last Acts 119 Coit St. Irvington, NJ 0711

**Powerful Tools for Caregivers** – Mathers Lifeways – [www.tools4caregivers.com](http://www.tools4caregivers.com)

**American Red Cross Caregiver Training**

**3. Resources for Employers**

**Special Report – Effective Planning for Caregiving** – United Seniors Health  
Council – NCOA

**Administration on Aging** – Aging Internet Information Notes – Caregiver and Aging  
Issues and Family Caregiving Fact Sheet [www.aoa.dhhs.gov](http://www.aoa.dhhs.gov)

**National Family Caregivers Association**

**National Alliance for Caregiving**

**AARP** – and various other resources

If you have a question about this resource notebook, please contact me at  
[Ellen.Nau@vda.virginia.gov](mailto:Ellen.Nau@vda.virginia.gov)



**NEWS FROM U.S. SENATOR LARRY CRAIG**  
**CHAIRMAN**  
**U.S. SENATE SPECIAL COMMITTEE ON AGING**

Washington, DC 20510

<http://aging.senate.gov> Lupe Wissel, Staff Director

February 12, 2004

Contact: Jeff Schrade (202) 224-8710

**FOR IMMEDIATE RELEASE**

Iris Amador (202) 224-4839

**CRAIG INTRODUCES TAX RELIEF LEGISLATION  
FOR FAMILY CAREGIVERS**

"This is the fiscally sound, right thing to do for our nation's seniors," Craig says

(Washington, DC) On the heels of a congressional hearing exploring tax relief strategies for eldercare, U.S. Senator Larry Craig, Chairman of the Special Committee on Aging, introduced legislation in the Senate today designed to support families who provide caregiving help for their aging relatives.

**The Senior Eldercare Relief and Empowerment Act (SECURE Act, S. 2072)** is designed to provide a 50 percent tax credit rate for qualified expenses for elder care provided to a senior citizen with long-term care needs.

"We have received tremendous support from caregivers and care professionals alike on the need for tax relief for those self-less and loving family members who willingly assume these tremendous caregiving responsibilities. I urge my colleagues to join me in quickly moving this compassionate legislation so that the necessary help to who provide the care for our nation's elderly can benefit from tax relief," Craig said.

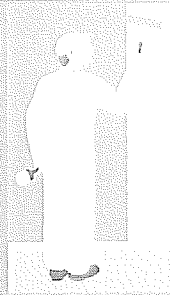
At a Special Committee on Aging hearing Craig held on Tuesday, Trudy Elliot, a family caregiver and home health nurse from Idaho provided moving testimony illustrating the need for Craig's approach to helping families like hers. She said Craig's bill would have helped when her mother and sister were sick, and will help other families in the future, if passed by Congress.

Craig believes that this is a national issue requiring a flexible national response to ensure that seniors and their families have high quality choices for eldercare.

"The Secure Act is a major step in crafting the right policy mix to ensure that frail seniors can stay in the dignity of their own homes, and receive quality care, for as long as possible", said Craig. "This is the fiscally sound, right thing to do for our nation's seniors."

####





## INTRODUCTION

This binder can make your job and your company more productive. It is a compilation of resources that can help your company address the adverse workplace consequences of employees trying to balance work and caring for an older relative.

As the population continues to age, the number of caregivers in the workforce will grow, placing tremendous burdens on both workers and their employers. This trend will not go away soon. The companies that will thrive in the future will adapt to this reality.

Don't be fooled because the problem isn't very visible. Employees often feel there is a stigma associated with being a caregiver and may not want to reveal this fact at work for fear that they could be fired, demoted or not promoted. This is particularly true during a recession.

The National Council on Aging (NCOA), with funding from the AT&T Family Care Development Fund\*, produced this binder to help businesses increase their knowledge and access to community resources. Newly created Employee Caregiver Task Forces in five communities will be sharing these resources with business in their communities. A list of contacts for the Employee Caregiver Task Forces is listed in the back of this binder.

We hope you will peruse through the binder and select and distribute materials that are useful to your company. When possible, ordering information for extra copies is included. A CD which includes a power point and hand outs, is also included. These materials could be used at company sponsored health fairs, "lunch and learn" sessions, posted on bulletin boards, web sites, or distributed through your intranet.

Read on to learn more about this quiet, but growing issue so your business can explore how to implement or strengthen human resource policies and practices that will improve both your bottom line and the lives of employee caregivers.

*\*The funding is a joint project of At &T, the International Brotherhood of Electrical Workers and the Communications Workers of America.*

# **Beginning the Dialog: How Employers and Employees Can Create Care-Giver Friendly Work Environments**

**By Leah Dobkin**

## **Meet Sarah and Tom**

Sarah Brenner, a financial advisor, was with an important client when she received an emergency call. Her 82 year old mother fell out of bed and broke her hip. Sarah was torn between finishing her important meeting or rushing home to aid her mother. Sarah knew there really was no choice. She apologized to the client for having to abruptly cancel their meeting, and rushed home to help her mother. Another financial advisor took over the meeting. Sarah lost her commission and a valuable client.

Tom Johnson, the owner of the small investment company that Sarah works for has noticed an increasing number of his employees struggling to balance work and caregiving responsibilities. He has persistent personnel problems. He's concerned that an increasing number of his employees are paying less attention to details, have difficulty making decisions, and are fatigued and irritable. This impacts how his employees treat clients and ultimately Tom's bottom line. Tom tries to look the other way, but finds that accommodating these disruptions and distractions lowers productivity.

He wonders what a company with only 32 employees can do to help ease caregiver burdens. Tom believes his hands are tied because the recession has cut into his profits. The premiums for the health insurance he provides his employees have increased by 21 percent.

Sarah and Tom are examples of how both employees and employers share a common struggle to reduce the negative impact of caregiving in the workplace. Sarah is one of 30 million baby boomers engaged in work and trying to take care of an older loved one. She is an employee caregiver who often experiences conflicts between her work, home and caregiving responsibilities. These conflicts can produce high levels of stress, guilt and frustration. Employee caregivers like Sarah, try to balance home and work obligations, but it's a challenging juggling act.

Tom is one of millions of employers beginning to recognize the heavy toll caregiving can place on workers and business. He is starting to realize that caregiver burdens have become his company's burden, and he needs to respond. Offering cost effective elder care benefits, policies, and programs to his current employees may help retain and attract good workers. Implementing "caregiver friendly" work policies could also enhance his company's reputation, which could attract new customers.

## **Changing Demographics Create Mutual Goals**

- Why are businesses beginning to pay attention to caregiver issues? The number of employees who are also caregivers is growing. According to the 1997 *National Study of the Changing Workforce* by the Families and Work Institute,

prevalence of caregiving among employed persons is 25%, with 45% of respondents to that survey reporting that they anticipated providing eldercare in the next five years. The huge demographic “bubble”, the 76 million baby boomers, is growing older as are their parents.

The fastest growing population is not those in strollers, but those who are most likely to use wheel chairs. In fact, there are more people over 85 than under five. The baby boomer parents are living longer than any generation in US history. The 85+ year olds, sometimes referred to as the “old-old,” are the fastest growing segment of the population, and the group most likely to need care. As the population continues to age, the number of caregivers in the workforce will grow, placing tremendous pressures on both workers and their employers.

Employers want to attract and retain good workers, and remain competitive. Employees want to perform well at work and effectively manage caregiver and other personal responsibilities. Both employers and employees want to maximize productivity. For this to happen, work place policies, programs and benefits are needed to be implemented to effectively address the concerns of all involved. This article is intended to encourage a dialog toward that end.

## Employee Caregiver Issues

### The Big Squeeze

“Jane” is a geriatric case manager. She works full time; has a 19 year old son and a 15 year old daughter, and takes care of her 76 year old mother who suffers from Pulmonary Fibrosis. Her mother lives in her own home, but needs a lot of hands on assistance to remain there.

*“Sometimes I feel torn between wanting to help my mother and running away as fast as I can. Something has to give somewhere. So I eat junk food on the run. I cancel my doctor’s appointments and my mammography exam. Even though my children are older, they still want me in the house. I feel like I am constantly driving and doing errands for my mother or going back and forth to her house. I have almost been in a number of car accidents because I am so physically and emotionally drained. As a geriatric case manager it’s easier to dispense the advice that caregivers need to take care of themselves and more difficult to do it.”*

Employees may have to squeeze caregiver responsibilities and crises during working hours. “Mary” will sneak a phone call to mom to make sure she took her morning medication and that she is OK. Peter will act like he’s going to lunch, but instead takes his dad to his doctor’s appointment which lasts longer than the lunch break. Perhaps Emily comes in late or leaves early from work because she has to transport her husband who has Alzheimer’s, to an adult day care center. Unfortunately, the center’s hours doesn’t mesh well with her working hours.

Employee caregivers never have enough time in the day. Flexible work hours, job sharing, telecommuting could help ease the time constraints on employee caregivers. For example “Jane” squeezes in her caregiving responsibilities primarily in the evenings and weekends. However, there are times when she needs to help her mother during working hours. Her company has informal, flexible policies that support employee caregivers. Employees are allowed to combine vacation, sick and personal days to enable them to take time off, with pay, to take care of relatives.

*“You don’t have to pretend you’re sick, you just take the day off when needed,” stated “Jane.” She added, “My supervisor is supportive of me taking time off because she asks sincerely how my mother is feeling and encourages me to do what I need to do for my mother as long as the work gets done somehow.”*

### **The Quiet Problem at Work**

Daryl Laird is a human resource management consultant. Ironically, she provides management level human resources consulting services to corporate clients, yet her company is completely unaware of the challenges she faces on a daily basis as an employee caregiver for her 79 year old mother. Her mother, Ruth Laird, is suffering from the effects of strokes, diabetes, congestive heart failure, and other medical concerns. Daryl has cared for her mother for three and a half years in the home that she purchased specifically to enable her mother to live in a home environment instead of a nursing home. She feels that workers would be stigmatized if bosses at work knew they were caregivers. As she puts it, *“The marketplace is a competitive one and employees and/or consultants can all be replaced.”*

Employees often feel there is a stigma associated with being a caregiver and may not want to reveal this fact at work for fear that they could be fired, demoted or not promoted. This is particularly true during a recession.

Since one quarter of the current workforce are employee caregivers, that means the gal who sits at the desk next to you could very well be a caregiver. Like you, she is struggling to balance work, family and caregiving responsibilities, but no one knows it except her hairdresser, her family, and perhaps a few close friends.

Caregivers’ feel that it is simply not appropriate to talk about their personal or family life at work. Caregiving is an emotionally laden, very personal experience according to Diane Piktialis, Work Life Product Director for Ceridian, a company that provides Employee Assistance and Worklife programs to employers. Piktialis believes there are complex feelings about the person you are caring for as well as siblings and other relatives who may or may not be helping out. She adds that role reversals (child becomes parent and parent becomes child), family histories, and confronting your relatives’ or your own mortality, makes it very uncomfortable for employees to raise caregiver issues at work.

Even when an employer offers benefits, policies and programs that help employee caregivers, many don't take advantage of these supports because they don't feel it is a legitimate work life concern or because they fear retribution. Only two percent of eligible employees make use of the benefits that are in place according to Donna Wagner, Director of the gerontology program at Towson University.

Caregivers do not self identify. The term "caregiver" is foreign to many and although workers may be caring for older relatives, they don't realize they are employee caregivers. Nor do they realize that there are millions of other employee caregivers just like themselves. Mix in the fear of aging and its negative associations, guilt and denial, and one can see why workers are not talking about caregiving at the water fountain. All these factors can keep employee caregivers in the "closet." The irony is that it's a crowded closet and becoming more crowded by the day.

### **Impact on Personal, Family and Social Life .... What Personal, Family and Social Life?**

The sandwich generation is those baby boomers who simultaneously take care of their children and their parents. Many of them have evolved into the double decker sandwich generation. Suzanne Gagner and her three siblings help take care of their 81 year old mother who until recently was taking care of her 107 year old mother, who died this past spring. Nancy, one of her Suzanne's sisters, said "only my mother could keep grandma alive for 107 years." The siblings also have children of their own they need to take care of. Four generations are intertwined in caregiving.

Suzanne's grandma lived with Suzanne's mother Emily for 11 years in her home. During that time Suzanne was and continues to be a full time city clerk. She has an 18 year old son who was nine when they first moved grandma from her home in NY State, to live with their mother in Chicago. Suzanne feels that she and her mother missed a lot of her son's life because of work and caregiving responsibilities, such as keeping finances, cleaning, errands, "grandma sitting" and bringing meals to the house. She also helped dress and feed grandma.

Suzanne's sister, Nancy is a full time nurse practitioner working 50 to 60 hours a week. She has a 23 year old daughter and a 20 year old son. Nancy was the service coordinator/problem solver in the family during this eleven year caregiving experience. She arranged home visits from the doctor, priest, nurse, and home health aide. She bathed, provided foot and nail care, and fed and read to her grandmother. She also transported her to social and family functions and church. When Nancy's children were small, she worked evenings so she could take care of her children, mother and grandmother.

Nancy tells herself, *'I can do what I can do. Others have to do what they can do, and hopefully no one feels overwhelmed or 'put upon'. That's why having siblings and cousins are so wonderful.'*

Employees experience tremendous stress trying to juggle work, family and caregiving responsibilities. This stress negatively impacts their physical and emotional health, and social life. Employee caregivers interviewed for this story have expressed concern and frustration about the difficulty in maintaining a personal, family, and social life. They stated that the older loved one needing care in their life is the priority and everything else is secondary. Many people give up educational pursuits, and family and social functions. One caregiver stated, *"There is simply no free or personal time what so ever. There's no time for spontaneous fun. Everything has to be planned in advance and often it is difficult to find a "grandma sitter."*

Caregivers don't sleep well because they worry about their older loved ones wandering off or harming themselves, and they worry about the financial strain caused by caregiving. Caregivers feel preoccupied and have difficulty focusing at times. Some employee caregivers acknowledged that caregiving has adversely affected their physical and emotional health, and stamina. Perhaps the greatest impact mentioned was the loss of quality time with their children and spouses.

It is important to mention that employee caregivers interviewed for this article have also expressed a tremendous sense of satisfaction helping their loved ones and feel that they are "giving back" the love, care and dedication they had received from their older relatives. They often say, "It's the hardest job I've ever done but the most rewarding too."

### **A Financial Pressure Cooker**

Employee caregivers incur significant losses in income due to caregiving responsibilities. A study conducted by MetLife Mature Market Institute found the estimated financial cost to the caregiver during their caregiving and work career is \$659,139 (see side bar for specifics). Career development, salary, retirement income, and out-of pocket expenses related to care giving are all negatively impacted by caregiving obligations.

Caregivers pay an average of \$171 per month out of pocket for groceries, medications, home modifications, and expenses for home care. Food, transportation, and medication are the three most common expenses, according to the MetLife study.

Costs can still accrue even when a loved one is in a supportive living arrangement such as assisted living or a nursing home, where all the care is provided. For example Sharon Zureck from Palatine, IL buys her mother diapers, which cost \$125 instead of having the nursing home charge her \$225 for diapers. The nursing home is flexible and allow this cost saving.

### **Lost Income**

- Nearly two-thirds of the caregivers surveyed reported that their caregiving responsibilities had a direct impact on earnings.

- The loss in average wealth over the lifetime equaled \$566,443
- Losses from lifetime wealth from social security averaged \$25,494
- The losses from pensions averaged \$67,202

## **Elder Care is becoming an Important Business Issue**

Employees are not the only ones who experience financial losses due to caregiving. Caregiving has a negative impact on employee productivity. There are business costs associated with lost productivity, as well as management, and administrative costs. Taking care of older relatives often means increased absenteeism, workday interruptions, extended leaves of absence, or early retirement and increased employee health care costs and supervisory time. In the aggregate, employee caregivers cost U.S. companies between \$11 and \$29 billion per year in lost productivity according to the Met Life study. (See side bar for specifics)

Child care became a growing issue for business leaders in the 1980's when large numbers of mother's entered the workforce. Now elder care is becoming an important business issue. Baby boomers are the largest segment of the labor force and most likely to have valuable skills, expertise and professional contacts. This means that some of the most valuable and productive employees will be affected by this issue. These same employees are also the most expensive to replace. It costs on average, one and a half times an employee's salary to replace that employee should they have to quit because of caregiving demands, according to Mary Ellen Gornick, a worklife field expert and president of CPA, a human resource consulting firm.

## **The Employers' Perspective**

### **Employee Caregivers' Impact at Work**

*"It's not just about replacement costs for my workers who leave due to caregiving burdens, it's also about increased use of sick leave and Family Medical Leave Act time to care temporarily for a sick parent. Increased absenteeism and figuring out how other workers can pick up the slack is difficult. Good workers who become employee caregivers are reluctant to accept transfers or promotions.*

*Perhaps most challenging is presenteeism: the costs to my business due to workday interruptions while workers make incessant phone calls to doctors, home health workers and coordinate care with other relatives and friends. I have to run my business so lean that it's difficult to offer employee caregivers additional benefits other than the ones we currently offer all Employees."*

A business owner



Companies are faced with enormous challenges to survive. How do businesses develop cost effective responses to caregiver needs, at a time when corporate budgets are growing tighter and employee health benefits are increasing at a double digit rate? Yet many businesses are beginning to feel like they have to do something because doing nothing maybe more costly.

### **Employers' Response is Growing**

As baby boomer workers struggle to care for their aging parents, company sponsored elder care programs have experienced steady growth over the past few years. According to a Hewitt Study, half of all employers offer some form of elder care assistance, with dependent care spending accounts (38 percent) and resource/referral programs (33 percent) being most common. In 2000, 15% of employers surveyed by the Society of Human Resource Management (SHRM) offered an eldercare referral service as an employee benefit. In 2001, that figure grew to 19%, and it climbed again in 2002 to 21%. Long-term care insurance increased its presence in benefit plans from 36% to 48% over the same period.

One example of how a Chicago company is responding to the financial needs of employee caregivers is Near North Insurance Brokerage Company. It has approximately 800 employees. Gail Steingold, over sees the Long Term Care Insurance core benefit introduced two years ago. The LTC insurance was made available to employees, their spouses, parents, in laws, grandparents of the employees. According to Steingold, the insurance pays most of the costs of services an older parent or spouse may need and goes a long way toward reducing the financial and emotional burden on our employee caregivers.

Another example of how a local company is responding is Northern Trust, a financial service company supplying banking services to individuals, corporations, and institutions. Northern Trust has approximately 8,200 employees. Monica Ferkin is the Manager of their Family Assistance Program which offers on site support groups and monthly lunch and learn sessions for employee caregivers. She stated, *"The EAP and Work life programs we offer our employees help them take the initiative to plan for their older relatives needs before a crisis, which prevents enormous work place disruptions and it's not an expensive program. ."*

### **Does Size Matter?**

The size of a company's workforce can affect what policies, programs and benefits it can offer its employee caregivers. Smaller companies may have more informal arrangements. When offices are small, it's hard to absorb a lot of disruption, yet coworkers may try to cover for each other by cross training each other's functions. Some small companies cross train during staff orientation.

However, smaller companies capacity to respond to their employee caregivers is changing. *" Once a luxury that only large national corporations could afford, elder care benefit programs now come in a variety of formats with services as simple as toll-free*



*call centers and web sites with information about local elder care programs,” according to Bob O Toole, President of Informed Eldercare Decisions, Inc., a company that provides elder care work solutions.*

### **It's the Culture**

Perhaps company size is not as important as a company's work culture. It doesn't make a difference how many benefits, programs and policies are offered to support employee caregivers. If the work place culture does not change, no one will feel comfortable enough to access these supports. It's really the supervisor or manager who makes the difference. For example, if your company offers flex time, but your boss won't let you use it, it doesn't do you any good.

*“Managing elder care conflicts well is a subset of managing people well. Some managers think that allowing for flextime or job-sharing implies weak organizational structure and a lack of standards in managing worker performance. This could not be further from the truth. In fact, allowing for creativity in how a group of workers fulfills responsibilities requires better organization and clearer standards than the "look over your shoulder" brand of supervision.” according to John Marosy President of Bringing Elder Care Home, a consulting firm that helps companies better deal with elder care/work conflicts.*

### **The Balancing Act**

*“Employers have genuine operational needs i.e.; they have jobs and responsibilities which still need to be performed while an employee is on Family Medical Leave Act (FMLA) and/or budgets within which to operate. All concerns, i.e. the employer's and employees' needs must be balanced and addressed,” Darryl Laird Human Resource Management Consultant*

Just as employee caregivers try to balance home and work responsibilities, employers try to balance worker needs with business needs and available resources. What is encouraging is that a growing number of different sized businesses are responding to employee caregiver needs. Their response may be formal or informal, but never the less, work cultures are changing.

Employee caregivers do not have to go it alone, and companies do not have to lose valuable employees. Employees and employers do not need to be in conflict. There are win-win solutions.

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